



Walsall Council

How to Create a Document Record

Sickness Steps

This Guide is for Line Managers

Author	Version	Edit Date
Joanna Pugh	1.0	30/06/24
Sophie Neale	2.0	12/07/24
Sophie Neale	3.0	26/07/24
Jenny Felton	4.0	17/07/2025

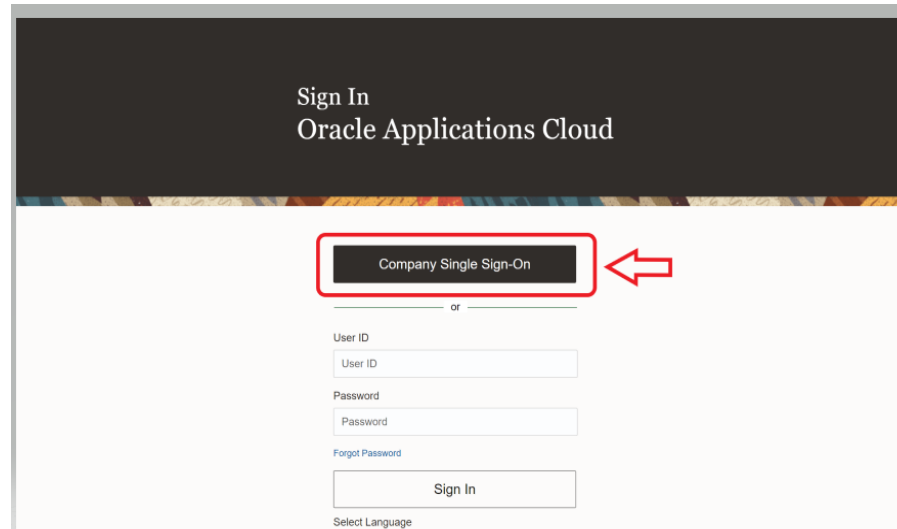


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Step Number
1

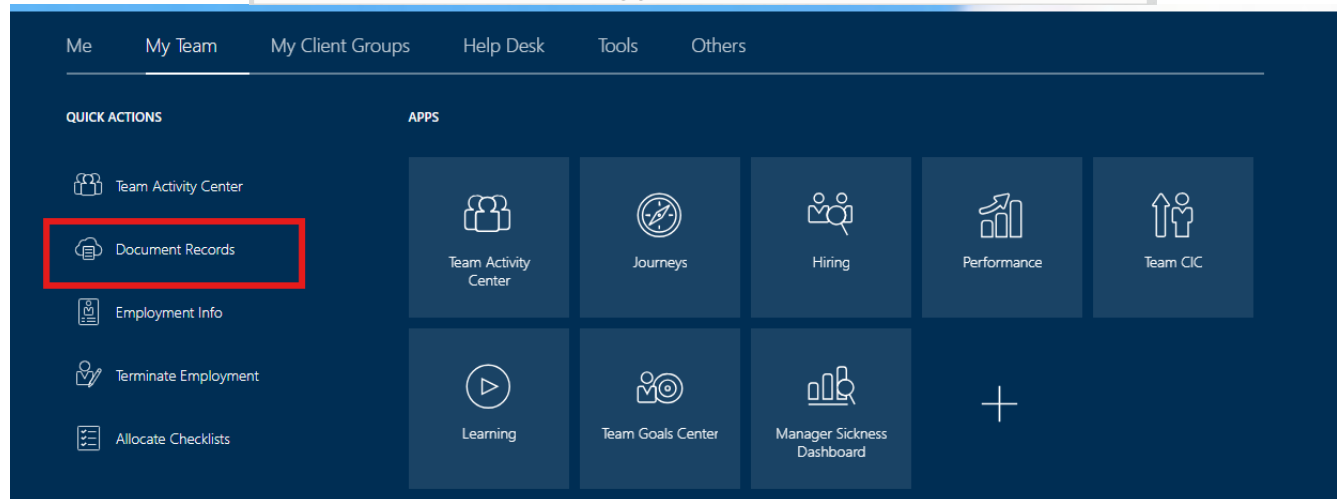
Step Description
Sign into OneSource.

Step Image



2

Select the My Team tab and then Document Records on the right-hand side.





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3

Select
employee's
name

< Document Records

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Sort By Relevance

Name	Business Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
Employee Test	Administrator			Active - Payroll Eligible	Employee	

Use either the
search function,
Click on
employees
name

Clear filter to
show all

4

Select the Add
icon

< ET Document Records

Employee Test, Administrator

Search by type, name, or number

Category Excluded Last Updated Type Filters

+ Add

After you add a document record, you can view it here.

5

Select
document type
using the
dropdown box

ET New Document Record

Employee Test, Administrator

Document Type

Sickness Steps United Kingdom Absence



6

Select sickness steps from document type drop down

Populate the information from the sickness absence

ET

New Document Record
Employee Test, Administrator

Cancel

Submit

Document Type
Sickness Steps

Country
United Kingdom

Category
Absence

Employee Job Title

Assignment ID
Required

Absence start date which triggered review

Absence end date which triggered review

Date of meeting

Manager's Name

Employees representative

Total number of occurrences / periods of absence in the ...

Total number of calendar days lost which triggered review

Date the employee given 5 calendar days notice o...

Employee offered the right to representation

Current step in sickness absence procedure

Notes of the meeting

Employee made aware of the outcome

Action taken

Assignment number is employee number

7

Select the current step in the sickness absence procedure in the drop-down list

Employees representative

Total number of occurrences / periods of absence in the ...

Total number of calendar days lost which triggered review

Date the employee given 5 calendar days notice o...

Employee offered the right to representation

Current step in sickness absence procedure
1st Formal Warning
Final Formal Warning
No Current Stage

Notes of the meeting

Employee made aware of the outcome

If no action please state why (max 150 char)

Date of Hearing(to be completed by HR)

Dismissal Date(to be completed by HR)

Notes of Hearing(to be completed by HR)

Not Dismissed Outcome(to be completed by HR)



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8

Add any additional information by dragging files or click to add attachments

Attachments

Drag and Drop
Select or drop files here.

URL

Add URL

9

Check the mandatory fields are populated and submit

Cancel

Submit



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